

## ePROCUREMENT 8.8

### MODTABLE INFORMATION

The PO's ModTable screen captures unique LBNL-required statistical information for each PO and change order to assist in producing various reports. It is important that this information be as accurate as possible to assure reliable reporting to various LBNL stakeholders such as DOE & UC. To get to the ModTable, click on the [Mod Table Details](#) link on the *Maintain Purchase Orders* page.

**Add/Update POs - Windows Internet Explorer**

https://fmssrv2.lbl.gov:8001/psp/fmsprd/EMPLOYEE/ERP/c/MANAC

File Edit View Favorites Tools Help Links FMS LBNL

Home Worklist Add to Favorites Sign out

New Window Help Customize Page

Unit: LBNL Vendor: PROMEGA CORP  
PO ID: 6706098 PO Date: 05/20/2003  
Chng Order: 6 Req GFP/SAP: PO Status: Dispatched

**Main Information**

Award Date: 07/23/2007  
Confirm Date: 07/23/2007  
Confirmed to: CHRISTINE PFISTER  
Po Type: 2 Ext-Term  
\*Award Type: FF  
Buyer Name: SMNOLAN  
Amt Change: 10697.250

**Vendor Classification**

Entity: LB  
Set Aside:   
NAICS: 541710  
☐ Disadvantaged  
☐ Women  
☐ Hub Zone  
☐ Veteran  
☐ Disabled Veteran  
☒ Debarred Checked ☐ Ca Dis Vet

**Documentation**

☐ GSA  
☐ UC Agreement  
☐ Foreign Made  
# Firms Solicited: 1  
☐ Sole Source  
Sole Source Basis: FO  
\*Price Reason: PP  
Price List Date:   
Price List No:   
☐ Price Reason: PP

**PO Administration**

Start Date: 07/01/2003  
End Date: 06/30/2008  
Cert Required: AL  
Certifier: 812494 Jefferson, Helen  
Cert Location: 941-0139  
Retention %:   
Previous Order: 6477544  
Quality:   
Req Date: 07/20/2007  
GFP/SAP: No  
Req. Services Details:   
Safety Plan Required: No

Comments: CO #1 extends term, updates LBL contact info. jic CO # 2 extends term no add funds smn; CO # 3 extends term no add funds smn

OK Cancel Refresh

Local intranet | Protected Mode: On 100%

### Header Information (at top of ModTable)

This section displays general information about the PO/Mod such as: PO Number, Change Order Number, Requisition GFP/SAP, Vendor, PO Date, & PO Status.

### Main Information

This section contains overall PO information.

- **Award Date:** Defaults to the date the PO was created. Update this to the date the PO or Modification is issued to the vendor.
- **Confirm Date:** The date the salesperson is given a PO number on the phone
- **Confirmed to:** The name of the salesperson who was given the PO number
- **PO Type:** This defaults to 1. Change it to 2 for blanket subcontracts.
  - 1 for one-time PO (usually when something is received by Receiving)
  - 2 for blanket subcontract/extended term subcontract. Blanket subcontracts are billed over several months and do not involve formal receiving.
- **Award Type:** The method for pricing the contract. Defaults to Firm Fixed Price.

CA	Cost Plus Award Fees
CF	Cost Plus Fixed Fees
CI	Cost Plus Incentive Fees
CN	Cost No-Fee
CS	Cost Sharing
FE	Fixed Price Economic Price Adj
<b>FF</b>	<b>Firm Fixed Price</b>
FI	Fixed Price Incentive
FR	Fixed Price Redetermination
LH	Labor Hour
MR	Interagency/Int'l Agreement
NF	No Funds
TM	Time & Materials

- **Buyer Name:** The buyer/subcontract administrator who issued the latest PO Modification (Mod). (The Buyer on the PO Header is the one responsible for administering the PO.)
- **Amt Change:** Automatically displays the dollar change from the previous Mod. (This changes to the correct value after you Save the PO.)

### Documentation

This section contains pricing and sourcing information.

- **GSA:** Check to indicate that the PO is issued under the terms of a Federal Supply Schedule (GSA contract)
- **UC Agreement:** Check to indicate that the PO is issued under the terms of a University of California-negotiated agreement.
- **Foreign Made:** Check to indicate that the item is foreign-made.
- **# of Firms Solicited:** Enter the number of vendors you solicited prices for on this PO.

- **Sole Source:** If checked, indicates that the Requester/Requisition Preparer prefer an award on a sole source basis. This should be unchecked if the PO is to be competitively awarded.
- **Sole Source Basis:** Indicates the reason why the Requester/Requisition Preparer want the award to be a sole source. This should be changed to the final valid reason for a sole source or left blank if competitively awarded.

AS	Authorized by Statute
CO	Compatibility w/ existing equip
FO	Follow-on w/ same vendor
IA	International Agreement
IM	Industrial Mobilization or Eng
LF	Leader in field of expertise
NS	National Security
PI	Public Interest
UC	Unique capability, only known
UU	Unusual Urgency

- **Price Reason:** Select the principal reason why the price is reasonable. (Required field.)

BK	Buyers knowledge of market
CA	Cost Analysis
CO	Competition
MP	Generally uniform market price
PP	Established published price
RP	Comparison w/ recent prices

- **Price List Date:** Enter the date of the price list used as a basis for pricing this PO, if applicable.
- **Price List No:** Enter the price list number/name used as a basis for pricing this PO, if applicable.

### Vendor Classification

This section contains socioeconomic information about the PO.

- **Entity:** Shows the kind of business the PO is awarded to (Small Business, Large Business, etc.) IT IS IMPORTANT THAT THIS BE PRESENT FOR EVERY PO. If blank, have the Vendor table updated.

DO	DOE Contractor
ED	Educational Institute (Not UC)
FE	Federal Government
FO	Foreign Contractor
LB	Large Business
NP	Non Profit
SB	Small Business
SL	State & Local Government
UC	University of California (IUT)
VA	Various & Utilities

- **Set Aside:** Indicates the kind of set aside, if any, that applies to the PO. Leave blank if not set-aside.

8A	8A Set-Aside
HZ	HubZone Set-Aside
NO	None
SD	SDB Set-Aside
SS	SB Set-Aside

- **NAICS:** The *North American Industry Classification System* code. This number is required for all written solicitations.
- **Debarred Checked:** For POs over \$25,000, check this to indicate that the *Excluded Parties List System* has been checked and the vendor is not debarred from Federal transactions.
- **Disadvantaged:** Check to indicate the vendor is a disadvantaged business.
- **Women:** Check to indicate that the vendor is a woman-owned business.
- **Hub Zone:** Check to indicate that the vendor is in a Hub Zone
- **Veteran:** Check to indicate that the vendor is owned by a veteran.
- **Disabled Veteran:** Check to indicate that the vendor is owned by a disabled veteran.
- **Ca Dis Vet:** Check to indicate that the vendor is owned by a California disabled veteran.

#### PO Administration

This section generally contains information associated with post-award activities and Type 2 (blanket) subcontracts.

- **Start Date:** Applies only to Type 2 POs (blanket subcontracts). It defaults to the Due Date from the requisition. Adjust this to be the date when the vendor is to begin providing goods or services to the Lab. This does not need to be changed for Type 1 POs.
- **End Date:** Applies only to Type 2 POs (extended-term subcontracts). Adjust this to be the date when the vendor is to stop providing goods or services to the Lab (when the subcontract will expire). This does not need to be changed for Type 1 POs.
- **Cert Required:** This defines the kind of invoice certification required. If left blank, no certification is required. Defaults to highest certification level of all Item Categories. Certification is generally not needed for POs that are received by Receiving.

>\$	> Invoice \$ (5K)
AL	Always Required
NV	Never Required
PN	Payment Notification

- **Certifier:** The Employee # of the certifier who will be sent PO invoices to certify by AP. Defaults to the requester when Cert Required is not blank
- **Cert Location:** The certifier's Bldg/Room entered by the system (generally not needed).
- **Retention %:** The percent of invoice amounts that are to be withheld for payment by AP.
- **Previous Order:** The previous Type 2 blanket PO number that was replaced by this PO.
- **Quality:** Not used. Leave blank.

- **Req Date:** This defaults to the requisition approval date of the last requisition added to PO Mod 0. It is used to calculate *Lead Time* (Award Date minus Req Date). Update this date to reflect the date all required information was received from the requester to proceed with the purchase.
- **GFP/SAP:** Click Yes to indicate if *Government Furnished Property* or *Subcontractor Acquired Property* applies to this PO.
- **Req. Services Details:** This appears when a requisition/PO line could involve services. It indicates the value entered by the requisition preparer: No Services, Off-Site Services, or On-Site Services. Use this value to help in determining if a safety plan is required on the PO.
- **Safety Plan Required:** Click Yes if On-Site Services require a Safety Plan or click No if a Safety Plan is not required.

#### Comments

Enter the reason for issuing the PO Mod.

#### Printing Mods

To print PO ModTable entries, you can either:

1. Go to the ModTable and click you're the printer icon in Internet Explorer (only prints the current Mod) OR
2. Navigate to **eProcurement | Buyer Center | Inquiries and Reports** and click **LBNL PO Modifications Report**.